

EA Integration Plan - First 14 Days

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Company: Northline Ventures
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Day 1–3: Alignment + Access

Initial Focus:

- Clarify immediate priorities across fundraising, investor communication, and internal leadership coordination
- Understand current time allocation, with heavy emphasis on external communication volume and reactive scheduling
- Establish a consistent communication rhythm aligned with Daniel's preference for concise, low-friction updates

Executive Priorities (Identified):

- Managing high-volume investor and partner communication
- Protecting focus time for deal evaluation and internal strategy
- Reducing time spent on scheduling and coordination

Working Style + Preferences:

- Prefers direct, concise communication with minimal back-and-forth
- Values preparation—pre-read materials and clear next steps
- Strong preference to keep evenings (post-6 PM) protected for family time

Day 4–7: Observation + Light Support

Focus:

- Observe communication flow across email and Slack
- Identify patterns in scheduling, decision-making, and follow-ups
- Begin supporting in low-risk, high-frequency areas

Initial Support Implemented:

- Calendar coordination, including rescheduling and confirming investor calls
- Inbox organization (flagging priority messages, drafting responses where appropriate)
- Managing meeting logistics for internal leadership check-ins

Tools + Platforms in Use:

- Google Workspace (Calendar, Gmail, Drive)
- Slack (internal communication)
- Affinity CRM (investor tracking)
- Delta / Marriott profiles for travel

Day 8–10: Structured Support Begins

Focus:

- Step into defined support areas with increased ownership
- Reduce executive involvement in repeatable coordination tasks

Expanded Support:

- Proactive calendar management, including introduction of focus blocks and buffer time
- Inbox triage with prioritization of investor and partner communication
- Tracking key follow-ups related to fundraising conversations and internal initiatives

Communication Rhythm Established:

- Daily check-in (brief Slack touchpoint as needed)
- Weekly alignment (Monday morning)
- Urgent matters escalated via text

Primary Support Areas (Confirmed)

- Calendar + time protection
- Inbox and communication flow
- Follow-up tracking across investor and internal workstreams

Day 11–14: Optimization + Ownership

Focus:

- Transition from reactive support to proactive management
- Establish consistency across workflows and communication

Key Actions:

- Implement structured calendar flow aligned with priority work blocks
- Take ownership of recurring coordination and scheduling
- Anticipate needs related to investor communication and internal meetings

Outcome:

Daniel experiences reduced fragmentation in his day, improved visibility across priorities, and less involvement in day-to-day coordination.

NOTES

